

**From:** Mark Mueller  
**To:** Patrick, Mark S CIV JS DOM (US)  
**Subject:** [Non-DoD Source] checking in & Thanks!  
**Date:** Tuesday, June 5, 2018 8:53:39 AM  
**Attachments:** image001.png

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Hello Mark-

I hope that you are well and that the lake house is not under water. My what a monsoon we have endured these past few weeks! Right after you left the clock tower for the Metro, the sky opened up and absolutely poured. One of the bellman gave Tara a Trump hotel umbrella (Trump-Brella), which somehow ended up in my hands. My what a souvenir!

I wanted to check in with you following your week(s) of attending conferences, hosting/emceeing sessions and participating on panel discussions to see how you are doing. Hopefully things have eased up for you and you are feeling better.

We sincerely appreciate your participation in our summit on May 22. I was especially pleased to see the interaction among attendees and of course your conversations. I regret that I/we didn't use the opportunity to promote the NCC-AIIM chapter but I can surely do that in my follow-up notes to the folks who you spoke with. If someone were to "Join the community" from the NCC AIIM site, (Caution-<http://community.aiim.org/communities/chapterhome?CommunityKey=d384eb78-03f6-4ed4-836c-4407c8b9b87e> < Caution-<http://community.aiim.org/communities/chapterhome?CommunityKey=d384eb78-03f6-4ed4-836c-4407c8b9b87e> > ), does that then put them on the list to receive the MeetUp meeting invitations?

I will try to rope NDU, DOD OEA, and a few others into the chapter.. Looking forward to catching up in a calmer/slower environment.

All the best,

-Mark

Mark A. Mueller, Jr.

Director, DoD and Intel Community

Mark.Mueller@alfresco.com < Caution-mailto:Mark.Mueller@alfresco.com >

(703) 627-8374

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**From:** Patrick, Mark S CTV JS DOM (US)  
**To:** (b)(6) COL USARMY JS OC/CS (US)  
**Cc:** (b)(6) CDR USN JS DOM (US); (b)(6) CTV JS DOM (US); (b)(6) CTV JS DOM (US)  
**Subject:** (U//FOUO) After Action Report on 22 May 2018 participation in Alfresco Government Summit  
**Date:** Wednesday, May 23, 2018 4:22:43 PM  
**Attachments:** Alfresco Gov Summit Panel Questions.docx.pdf

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(b)(6)

Yesterday I participated in Alfresco's Government Summit at the Old Post Office (Trump Hotel) downtown. I was on a panel with a member of the NARA staff with whom I've done multiple panels in the past. The moderator was a person from Alfresco. The questions were provided in advance and I've attached them along with draft answers provided by Lisa (NARA), (b)(6) (my Records Officer) and me. I was invited to participate as a panelist by Alfresco's DOD and IC rep, Mark Mueller. Alfresco had also sent a panelist to participate in the Baltimore KM Symposium at my request last week (DOD CIO wanted private sector participation.)

The attendees were mostly government employees, and contractors and vendors who supported government contracts. I ran into one attendee who had also been at the KM Symposium in Baltimore (a KMer from NDU.)

Alfresco is the content management undercarriage for our JSAP platform. It was procured because it is "open source" software which generally has less expensive license costs over time. It is also DOD 5015.02-STD compliant, a requirement for us. This is a DISA technical standard for records management applications recognized world-wide.

Sessions ran from around 8 through lunch with a reception social after the final event. The Chief Technical Officer for Alfresco, John Newton, presented on emerging capabilities of the platform and many of the partner companies that team with Alfresco were also there. Among other things, Alfresco announced that it was now "Chapter 3 compliant" with the DOD 5015.02-STD, meaning it is certified by DISA JITC to handle classified electronic records. We were waiting to hear this. Related: I was also able to meet in person with the JITC tester for the 5015.02-STD from Ft Huachuca who was in town for business with DOD CIO and attended the conference. (b)(6)

(b)(6) I usually IM chat with her on technical RM issues with some frequency, so it's always good to get to speak with her in person.

Additionally, I had one-on-one time with (b)(6) (b)(5)

(b)(5)

also briefly met the company's new CEO, Burnadette Nixon.

One of the more compelling panels was on the topic of "block chain" emerging technologies for use in records management. Here's an article that touches on the topic if you are interested in learning a bit more: <https://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/using-blockchain-to-improve-data-management-in-the-public-sector>. Note that we were asked about this on our panel. Of course there are many folks out there smarter than me on the topic and I managed to get a few of their business cards.

An ethics note on events like these. Alfresco is aware that they cannot put federal employees in a position where they publically endorse their product, so even though we are an Alfresco user, great pains were taken to avoid that and focus on the professional and business problems at hand. In the past, Alfresco has asked me to keynote at their sponsored function and our ethics attorneys batted that down saying it had the appearance of an endorsement. However, participating in a panel format with other federal folks in the space is ethically safe. Especially when they give you the questions in advance and stick to the script (they did.)

Participation in these types of events are important to keep up with emerging technologies and processes, to keep

professional networks strong, to keep up with the private sector, and to show the flag for the Joint Staff. I believe it was a worthwhile event.

Let me know if you have questions.

V/r,  
Mark

Mark Patrick  
Chief, DOM SJS Information Management Division  
Pentagon Rm 2D943

(b)(6)

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**From:** (b)(6) CIV JS DOM (US)  
**To:** Patrick, Mark S CIV JS DOM (US)  
**Subject:** RE: [Non-DoD Source] Re: Alfresco Government Summit: Modernizing Records Management Panel Questions  
**Date:** Monday, May 21, 2018 5:15:24 PM  
**Attachments:** [Image001.png](#)  
[Image002.png](#)  
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[Image004.png](#)  
[Image005.png](#)  
[Image006.png](#)  
[Image007.png](#)

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**From:** Patrick, Mark S CIV JS DOM (US)  
**Sent:** Monday, May 21, 2018 3:26 PM  
**To:** (b)(6) CIV JS DOM (US) <(b)(6) civ@mail.mil>  
**Subject:** FW: [Non-DoD Source] Re: Alfresco Government Summit: Modernizing Records Management Panel Questions

Here are the questions with Lisa's answers:

Can you provide any thoughts?

**From:** Lisa Haralampus [mailto:lisa.haralampus@nara.gov]  
**Sent:** Monday, May 21, 2018 12:38 PM  
**To:** (b)(6) @alfresco.com>  
**Cc:** Patrick, Mark S CIV JS DOM (US) <(b)(6) civ@mail.mil>; james.stossel@nara.gov; Tony Franzonello <tony.franzonello@alfresco.com>; Tara Combs <tara.combs@alfresco.com>  
**Subject:** [Non-DoD Source] Re: Alfresco Government Summit: Modernizing Records Management Panel Questions

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Hi all,

I will be at a MITRE event in Tyson's corner from 8:40 to 9:30. I plan to take 66 downtown and should be parking by 10:30. I will find you and go over our points then.

My only question is, **would you like a slide or two to explain who I am and what we do?** I can think of 2 slides I can send you asap. If we want to go slide-less, I'm good with that too.

In the meantime, these are great questions for dialog. Here is what my

high-level response will be. I think Mark will be able to jump in first to answer several of these.

**1. How do you see NARA's UERM requirements vs. the DOD 5015.02 Standard?**

-- I see the philosophical difference as UERM describes requirements for electronic records themselves regardless of the system that manages it, whereas 5015.2 describes requirements for records management system

-- I know that DoD is looking to reissue 5015.2 and have had conversations with the team working on the issue. It will be interesting to see if these standards become more philosophically aligned. Regardless, when DoD reissues 5015.2, NARA will revisit our endorsement -- which is contained in NARA Bulletin 2008-07

I do see continued issuance of 5015.2 as a way to compliment the UERM. The classified requirements that DoD needs will be driven mostly from DoD given the growing connection with NARA, Records Officers, and IT departments. The UERM will need socialization before 5015.2 is no longer needed.

**2. Where do you think most organizations are with regards to the 2019 Mandate?**

-- according to the SAORM reports, where we ask agencies if they are going to meet the mandate, the overwhelming majority say yes

-- we have just issued in March, success criteria for meeting the 2019 target, to help clarify expectations

-- the target is limited to permanent electronic records, not a large percentage of all electronic records.

I believe that agencies have not had opportunities to test the lifecycle of the electronic record for transfer to NARA. The success criteria gave sound guidance as it relates to expectations. The execution of electronic lifecycle management may be done differently. For instance for any agencies that chose to manage legacy emails may forgo the culling phase because it would be too labor intensive. It still remains whether or not the culling prior to transfer meets both agency expectations and NARA's.

**3. What advice do you have for an organization starting on their RM journey? Where would you recommend that they start to achieve the biggest impact? File shares, email, etc?**

Hardest issues I see: shared drives files, desk top applications, then

e-messages, including text/chats

To start: it's budget and dedicated resources, this isn't work that can be done part-time as other duties

I believe where they should start is not so much with a repository as they should start with a Road Map for the enterprise. I advise one of my branches to begin offering to organizations a business process map and collaborate with Knowledge Engineers to first determine how best to approach a business need that involves electronic recordkeeping and repositories.

**4. Do you see Blockchain being considered as an option for immutable records for the US government?**

Yes, blockchain is happening. It has potential as a technology to improve how services are delivered and to change how we think of records and documentation.

For the audience, Blockchain uses ...cryptography to keep exchanges secure, blockchain provides a decentralized database, or "digital ledger", of transactions that everyone on the network can see. This network is essentially a chain of computers that must all approve an exchange before it can be verified and recorded. At Joint Staff using both NIPR and SIPR and JWICS may pose challenges with the use of Blockchain in our secure systems. ????

**5. Is GDPR a factor for the US Federal Government?**

Yes, it is a factor. This would be a good question for our new Combatant Command Cybercom **General Data Protection Regulation (GDPR)** is the new European Union privacy law, approved in 2016 jointly by European Parliament, the Council of the European Union and the European Commission. ... **GDPR** aims to bring all the EU member states under one umbrella by enforcing a single data protection law. "Europe's data protection rules are undergoing sweeping changes. To keep up with the huge amount of digital data being created, rules across the continent have been re-written and are due to be enforced. From May 25, 2018, the new mutually agreed European General Data Protection Regulation (GDPR) will update personal data rules. GDPR will bring outdated personal data laws across the EU up to speed with an increasingly digital era. The previous data protection laws were put in place during the 1990s and haven't been able to keep pace with the levels of technological change. See <http://www.wired.co.uk/article/what-is-gdpr-uk-eu-legislation-compliance-summary-fines-2018> see also <http://money.cnn.com/2018/05/21/technology/gdpr-explained-europe-privacy/index.html> (big \$\$\$\$ fines can attach with non-compliance under the GDPR)

**6. Do you have guidance for managing structured data since most of the focus seems to be on unstructured records?**

Nothing new. Our transfer guidance issued in 2014 contains the transfer format standards for structured data, including preferred formats such as Comma Separated Value (CSV), OpenDocument Format Spreadsheet (ODS), and Extensible Markup Language (XML)

1.1 NARA will still accept EBSDIC as a transfer format, but it is likely to be sunsetted someday. No comment

**7. What other standards around the world affect RM thinking like ISO standards, VERS, MOREQ10?**

NARA participated in two ISO standards groups: ISO TC 46, SC 11 on records management and ISO TC 171 on document management. We participate fully in the sub-group meetings, discussing issues and recommending votes. In fact, one of my team member is still in Lisbon today as the annual records management subcommittee meeting just closed.

Of course international standards will continue to influence the way all of us manage information. I would like to see if the ISO has changed given the focus on Big Data.

Also, looking at emerging disciplines that affect RM. I've created the Knowledge Management Sync Cell to ensure internal groups are working to support one another and ultimately the Decision Makers! That's most important right now DM, KM, IM, RM for sure along with others like Legal and Privacy and Privacy and Declass.

**8. Where do you see the Cloud impacting Governance implementations? Or Hybrid Cloud implementations and long term storage options like Glacier.**

I see Cloud as the future, in both storing inactive and active records and in offering shared services/solutions with records and information management requirements included. When an outside source or service has control of your data the terms and conditions must be on the table at the beginning of the service for sure. Long-term storage like Amazon Glacier provides three retrieval options to fit your use case. Expedited retrievals typically return data in 1-5 minutes, and are great for Active Archive use cases. Standard retrievals typically complete between 3-5 hours work, and work well for less time-sensitive needs like backup data, media editing, or long-term analytics. Bulk retrievals are the lowest-cost retrieval option, returning large amounts of data within 5-12 hours at a cost that can be daunting for Big Data producers and users like DoD.

On Mon, May 21, 2018 at 1:16 AM, (b)(6)@alfresco.com <Caution-mailto:(b)(6)@alfresco.com> wrote:

Hi Lisa & Mark –

Hope you both had a lovely weekend.







We are all looking forward to a valuable event on Tuesday, and, while I know it was hard to align schedules for a virtual dry run these past few weeks, I have attached the final questions here for your review and thought we could all meet for breakfast at 8:00 a.m. before the event kicks-off at 8:30 a.m. to review them as a group.

I will go ahead and put a meeting notice in our calendars and have a reserved table for everyone, and will plan to greet you both at registration and escort you to the table with a printed copy of these questions.

Please let me know if you have any questions or concerns.

Best regards,

(b)(6)  
Senior Manager, Global Customer Advocacy  
Mobile (b)(6)  
Skype: (b)(6)

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(b)(6)

**CIV (US)**

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**From:** Patrick, Mark S CIV JS DOM (US) </O=EASF/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN (b)(6) CIV> on behalf of Patrick, Mark S CIV JS DOM (US)  
**Sent:** Monday, May 21, 2018 12:15 PM  
**To:** (b)(6)  
**Subject:** Accepted: [Non-DoD Source] Breakfast Meeting to review RM Panel Questions & Flow

**From:** (b)(6)  
**To:** Lisa Haralampus  
**Cc:** Patrick, Mark S CIV JS DOM (US); james.stossel@nara.gov; Tony Franzonello; Tara Combs  
**Subject:** [Non-DoD Source] Re: Alfresco Government Summit: Modernizing Records Management Panel Questions  
**Date:** Monday, May 21, 2018 11:36:26 PM  
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Hi Lisa --

Thank you so much for the detailed response via email, and apologies for the late reply as we have been setting up the meeting space.

There are no slides needed as we have put together the attached slide to rest on for the panel and have allotted time during the beginning of the session for you to introduce yourself and NARA's mission.

I will keep an eye out for you at 10:30 a.m. tomorrow morning, but my cell phone is below if you need anything before then.

Thank you!

(b)(6)

Senior Manager, Global Customer Advocacy

Mobile (b)(6)

Skype:



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**Date:** Monday, May 21, 2018 at 12:39 PM

**To:** (b)(6)@alfresco.com>

**Cc:** "Patrick, Mark S CIV JS DOM (US)" <(b)(6)civ@mail.mil>, "james.stossel@nara.gov" <james.stossel@nara.gov>, Tony Franzonello <tony.franzonello@alfresco.com>, Tara Combs <tara.combs@alfresco.com>

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Best regards,

(b)(6)

Senior Manager, Global Customer Advocacy

Mobile: + (b)(6)

Skype: (b)(6)

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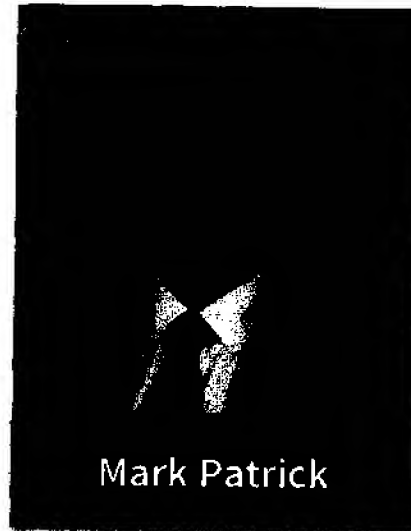
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Lisa Haralampus

Director of Records  
Management Policy  
and Outreach

NARA



Mark Patrick

Chief of the  
Information  
Management Division

The Joint Staff  
Secretariat



Tara

Global In  
Governan

Alf

**From:** (b)(6)  
**To:** Lisa Haralampus; Patrick, Mark S CTV JS DOM (US)  
**Cc:** james.stossel@nara.gov; Tony Franzonello; Tara Combs  
**Subject:** [Non-DoD Source] Alfresco Government Summit: Modernizing Records Management Panel Questions  
**Date:** Monday, May 21, 2018 8:18:04 AM  
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Senior Manager, Global Customer Advocacy

Mobile: (b)(6)

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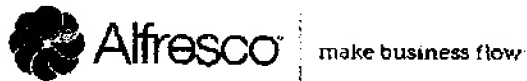
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# Records Management Panel

Tara Combs, Information Governance & Records Management Specialist, Alfresco

Mark Patrick, Chief, Information Management Division, Joint Staff

Lisa Haralampus, Director, Records Management Policy and Outreach, NARA

Tuesday, May 22, 2018

11:20 AM – 12:00 PM

40 mins

5 Minutes: Moderator to set the context/theme of the panel and introduce panelists.

Good morning ladies and gentlemen. It is my pleasure to be the moderator for the next panel session – Modernizing Records Management. Please help me welcome our fantastic panelists who will help us explore how a modern records management solution is essential to help you gain control of information governance, manage critical digital assets, and efficiently and cost effectively and comply with NARA mandates and FOIA requirements.

First we have Lisa Haralampus, Director of Records Management Policy and Outreach at NARA. Next we have Mark Patrick, the Chief of the Information Management Division at The Joint Staff Secretariat. Finally, we have Tara Combs who is the Global Information Governance Specialist at Alfresco. Thank you all for being here with us today.

Let's have each of our panelists start off with a bit about their backgrounds and current roles and then we'll dive right into our first question.

30 Minute Panel Discussion:

1. How do you see NARA's UERM requirements vs. the DOD 5015.02 Standard?
2. Where do you think most organizations are with regards to the 2019 Mandate?
3. What advice do you have for an organization starting on their RM journey? Where would you recommend that they start to achieve the biggest impact? File shares, email, etc?
4. Do you see Blockchain being considered as an option for immutable records for the US government?
5. Is GDPR a factor for the US Federal Government?
6. Do you have guidance for managing structured data since most of the focus seems to be on unstructured records?
7. What other standards around the world affect RM thinking like ISO standards, VERS, MOREQ10?
8. Where do you see the Cloud impacting Governance implementations? Or Hybrid Cloud implementations and long term storage options like Glacier.

5 Minute Q&A from the audience

**From:** Patrick, Mark S CIV JS DOM (US)  
**To:** "Mark Mueller"  
**Cc:** (b)(6) CIV DISA JT (US); (b)(6) CTR (US)  
**Subject:** Alfresco Gov't Summit  
**Date:** Wednesday, May 9, 2018 5:03:29 PM

---

Mark,

My friend the DOD 5015.02-STD Guru from JITC (b)(6) will be in the DC area during the week of the Alfresco Gov Summit. She's not 100% sure she can attend it, but would like to. She was having trouble registering on the Carahsoft site. Can she interact with someone via email on that? Also, she might also like to bring along one of the contract support folks from DOD CIO's office, (b)(6) (also my friend!)

Thanks,  
Mark

Mark Patrick  
Chief, Information Management Division  
Joint Staff Secretariat  
Directorate of Management  
The Joint Staff, Department of Defense  
Pentagon Room 2D943  
(b)(6)

**From:** Lisa Haralambous  
**To:** (b)(6)  
**Cc:** Patrick, Mark S CIV JS DOM (US); Tara Combs; Tony Franzonello; james.stossel@nara.gov  
**Subject:** Re: [Non-DoD Source] Re: Alfresco Government Summit: Modernizing Records Management Panel Questions  
**Date:** Friday, May 4, 2018 11:57:51 AM  
**Attachments:** [Image008.png](#)  
[Image005.png](#)  
[Image002.png](#)  
[Image004.png](#)  
[Image006.png](#)  
[Image003.png](#)  
[Image001.png](#)  
[Image009.png](#)  
[Image007.png](#)

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---

Sounds like a plan.

I'll reach out to Tara on Monday

- Lisa

On Fri, May 4, 2018 at 11:38 AM, (b)(6) <(b)(6)@alfresco.com> <Caution-mailto:(b)(6)@alfresco.com> wrote:

Good morning!

Unfortunately, Tara Combs is on PTO today and will also be on PTO Friday, May 18<sup>th</sup> and is crucial for the review.

If we can't all get together, then we can split up and review the questions and session structure individually and then try to grab breakfast on the morning of the event to bring it all together.

If you don't mind checking calendars one more time for availability the week of May 14<sup>th</sup> and let me know, then I will check on our end and see if we can get the full group together. If not, I'll book May 14<sup>th</sup> at 9am with Mark and then 2:30pm with Lisa.

Thank you, both!







Best regards,

(b)(6)

Senior Manager, Global Customer Advocacy

Mobile: (b)(6)

Skype: (b)(6)

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**From:** "Patrick, Mark S CIV JS DOM (US)" (b)(6) .civ@mail.mil < Caution-mailto:(b)(6) .civ@mail.mil > >  
**Date:** Friday, May 4, 2018 at 8:53 AM  
**To:** Lisa Haralampus <lisa.haralampus@nara.gov < Caution-mailto:lisa.haralampus@nara.gov > >  
**Cc:** (b)(6) @alfresco.com < Caution-mailto:(b)(6) @alfresco.com > >, Tara Combs <tara.combs@alfresco.com < Caution-mailto:tara.combs@alfresco.com > >, Tony

Franzonello <tony.franzonello@alfresco.com < Caution-mailto:tony.franzonello@alfresco.com >>, "james.stossel@nara.gov < Caution-mailto:james.stossel@nara.gov > " <james.stossel@nara.gov < Caution-mailto:james.stossel@nara.gov >>  
**Subject:** Re: [Non-DoD Source] Re: Alfresco Government Summit: Modernizing Records Management Panel Questions

I have time today as well. I am off the 18th but will dial in anyway if that's the only time that works.

Mark

Mark Patrick

Chief, Information Management Division

.....  
Joint Staff Secretariat  
Directorate of Management  
400 Joint Staff Pentagon/2D943  
Washington, DC 20318-0400

(b)(6)

Sent from my iPhone

On May 4, 2018, at 7:52 AM, Lisa Haralampus <lisa.haralampus@nara.gov < Caution-mailto:lisa.haralampus@nara.gov >> wrote:

All active links contained in this email were disabled. Please verify the identity of the sender, and confirm the authenticity of all links contained within the message prior to copying and pasting the address to a Web browser.

I have a conflict in the morning.

I actually have free time today and additional availability on Friday, May 18th.

- Lisa

On Fri, May 4, 2018 at 6:18 AM, Patrick, Mark S CIV JS DOM (US)

<(b)(6)@mail.mil < Caution-mailto:(b)(6)civ@mail.mil > < Caution-Caution-mailto:(b)(6)civ@mail.mil < Caution-mailto:(b)(6)civ@mail.mil > >>  
(b)(6) wrote:

(b)(6)

9-10 works for me. I have a conflict during the 2:30-4 timeslot.

(b)(6)

**From:** (b)(6) [Caution-Caution-mailto:(b)(6)@alfresco.com < Caution-mailto:(b)(6)@alfresco.com > < Caution-Caution-mailto:(b)(6)@alfresco.com < Caution-mailto:(b)(6)@alfresco.com > > ]  
**Sent:** Thursday, May 3, 2018 11:34 PM  
**To:** Patrick, Mark S CIV JS DOM (US)  
<(b)(6)civ@mail.mil < Caution-mailto:(b)(6)civ@mail.mil > < Caution-Caution-mailto:(b)(6)civ@mail.mil < Caution-mailto:(b)(6)civ@mail.mil > >>;  
'Lisa Haralampus' <lisa.haralampus@nara.gov < Caution-mailto:lisa.haralampus@nara.gov > < Caution-Caution-mailto:lisa.haralampus@nara.gov < Caution-mailto:lisa.haralampus@nara.gov > >>  
**Cc:** Tara Combs <tara.combs@alfresco.com < Caution-mailto:tara.combs@alfresco.com > < Caution-Caution-mailto:tara.combs@alfresco.com < Caution-mailto:tara.combs@alfresco.com > >>; Tony Franzonello <tony.franzonello@alfresco.com < Caution-mailto:tony.franzonello@alfresco.com > < Caution-Caution-mailto:tony.franzonello@alfresco.com < Caution-mailto:tony.franzonello@alfresco.com > >>; james.stossel@nara.gov < Caution-mailto:james.stossel@nara.gov > < Caution-Caution-mailto:james.stossel@nara.gov < Caution-mailto:james.stossel@nara.gov > >  
**Subject:** Re: [Non-DoD Source] Re: Alfresco Government Summit: Modernizing Records Management Panel Questions

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Great, thank you both.

Our team looks available on Monday, May 14<sup>th</sup> from 9a-10a EST and again in the afternoon from 2:30p-4:00p EST. We should only need 30 minutes to review the questions and logistics of the session.

Let me know what works best and I will get the calendar invite out immediately.

Thanks,

(b)(6)

Senior Manager, Global Customer Advocacy

Mobile: (b)(6)

Skype: (b)(6)

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**From:** "Patrick, Mark S CIV JS DOM (US)"

<(b)(6).civ@mail.mil < Caution-mailto:(b)(6).civ@mail.mil > < Caution-Caution-mailto:(b)(6).civ@mail.mil < Caution-mailto:(b)(6).civ@mail.mil > > >

**Date:** Thursday, May 3, 2018 at 5:17 PM

**To:** 'Lisa Haralampus' <lisa.haralampus@nara.gov < Caution-mailto:lisa.haralampus@nara.gov > < Caution-Caution-mailto:lisa.haralampus@nara.gov < Caution-mailto:lisa.haralampus@nara.gov > > >, (b)(6)@alfresco.com < Caution-

mailto:(b)(6)@alfresco.com > < Caution-Caution-mailto:(b)(6)@alfresco.com < Caution-mailto:(b)(6)@alfresco.com > > >

**Cc:** Tara Combs <tara.combs@alfresco.com < Caution-mailto:tara.combs@alfresco.com > < Caution-Caution-mailto:tara.combs@alfresco.com < Caution-mailto:tara.combs@alfresco.com > > >, Tony Franzonello <tony.franzonello@alfresco.com < Caution-mailto:tony.franzonello@alfresco.com > < Caution-Caution-mailto:tony.franzonello@alfresco.com < Caution-mailto:tony.franzonello@alfresco.com > > >,

"james.stossel@nara.gov < Caution-mailto:james.stossel@nara.gov > < Caution-Caution-mailto:james.stossel@nara.gov < Caution-mailto:james.stossel@nara.gov > > " <james.stossel@nara.gov < Caution-mailto:james.stossel@nara.gov > < Caution-Caution-mailto:james.stossel@nara.gov < Caution-mailto:james.stossel@nara.gov > > >

**Subject:** RE: [Non-DoD Source] Re: Alfresco Government Summit: Modernizing Records Management Panel Questions

I'll flex around Lisa's schedule. Propose a time and I'll see if I can protect it.

Mark

Mark Patrick

Chief, Information Management Division

Joint Staff Secretariat

Directorate of Management

The Joint Staff, Department of Defense

Pentagon Room 2D943

(b)(6)

**From:** Lisa Haralampus [Caution-Caution-Caution-mailto:lisa < Caution-mailto:lisa > .haralampus@nara.gov < Caution-mailto:haralampus@nara.gov > < Caution-mailto:lisa.haralampus@nara.gov < Caution-mailto:lisa.haralampus@nara.gov > > ]  
**Sent:** Thursday, May 3, 2018 2:12 PM  
**To:** (b)(6)@alfresco.com < Caution-mailto:(b)(6)@alfresco.com > < Caution-Caution-mailto:(b)(6)@alfresco.com < Caution-mailto:(b)(6)@alfresco.com > > >  
**Cc:** Patrick, Mark S CIV JS DOM (US) < (b)(6)civ@mail.mil < Caution-mailto:(b)(6)civ@mail.mil > < Caution-Caution-mailto:(b)(6)civ@mail.mil < Caution-mailto:(b)(6)civ@mail.mil > > >; Tara Combs <tara.combs@alfresco.com < Caution-mailto:tara.combs@alfresco.com > < Caution-Caution-mailto:tara.combs@alfresco.com < Caution-mailto:tara.combs@alfresco.com > > >; Tony Franzonello <tony.franzonello@alfresco.com < Caution-mailto:tony.franzonello@alfresco.com > < Caution-Caution-mailto:tony.franzonello@alfresco.com < Caution-mailto:tony.franzonello@alfresco.com > > >; james.stossel@nara.gov < Caution-mailto:james.stossel@nara.gov > < Caution-Caution-mailto:james.stossel@

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Subject: [Non-DoD Source] Re: Alfresco Government Summit: Modernizing  
Records Management Panel Questions

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Hi (b)(6)

Next week isn't good for me. I'm on travel.

But the following week, I could probably take a meeting on  
the afternoon of Monday, May 14th or the afternoon of  
Thursday, May 17th

On Thu, May 3, 2018 at 1:36 PM, (b)(6)  
<(b)(6)@alfresco.com < Caution-  
mailto:(b)(6)@alfresco.com > < Caution-Caution-mailto:(b)(6)  
(b)(6)@alfresco.com < Caution-mailto:(b)(6)@alfresco.com > > <  
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mailto:(b)(6)@alfresco.com > < Caution-Caution-mailto:  
(b)(6)@alfresco.com < Caution-  
mailto:(b)(6)@alfresco.com > > > wrote:

Hi Lisa & Mark -

Hope you are both having a good week!

I wanted to touch base as we have a final draft of the panel questions for  
our upcoming Modernizing Records Management Panel for your review.  
We'd like to schedule a virtual dry run in the next week or two to review  
the questions all together and go over the logistics of the session and event.

Can you please propose a few dates and times that work best for each of you and I will coordinate with the Alfresco team to get it on the calendar?

Thank you!

(b)(6)

Senior Manager, Global Customer Advocacy

Mobile: (b)(6)

Skype: (b)(6)

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**From:** (b)(6)  
**To:** Lisa Haralampus; Patrick, Mark S CTV JS DOM (US)  
**Cc:** Tara Combs; Tony Franzonello; james.stossel@nara.gov  
**Subject:** [Non-DoD Source] Alfresco Government Summit: Modernizing Records Management Panel Questions  
**Date:** Thursday, May 3, 2018 1:39:55 PM  
**Attachments:** image001.png  
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image003.png  
image004.png  
image005.png  
image006.png  
image007.png  
Panel 2 - Records Management - Final Outline.docx  
**Importance:** High

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Hi Lisa & Mark –

Hope you are both having a good week!

I wanted to touch base as we have a final draft of the panel questions for our upcoming Modernizing Records Management Panel for your review. We'd like to schedule a virtual dry run in the next week or two to review the questions all together and go over the logistics of the session and event.

Can you please propose a few dates and times that work best for each of you and I will coordinate with the Alfresco team to get it on the calendar?

Thank you!

(b)(6)

Senior Manager, Global Customer Advocacy

Mobile: (b)(6)

Skype: (b)(6)



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< Caution-<https://www.facebook.com/alfrescosoftware/> >



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[https://www.glassdoor.co.uk/Overview/Working-at-Alfresco-Software-EI\\_IE404506.11,28.htm](https://www.glassdoor.co.uk/Overview/Working-at-Alfresco-Software-EI_IE404506.11,28.htm) >



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# Records Management Panel

Tara Combs, Information Governance & Records Management Specialist, Alfresco

Mark Patrick, Chief, Information Management Division, Joint Staff

Lisa Haralampus, Director, Records Management Policy and Outreach, NARA

Tuesday, May 22, 2018

11:20 AM – 12:00 PM

40 mins

5 Minutes: Moderator to set the context/theme of the panel and introduce panelists.

30 Minute Panel Discussion:

1. How do you see NARA's UERM requirements vs. the DOD 5015.02 Standard?
2. Where do you think most organizations are with regards to the 2019 Mandate?
3. What advice do you have for an organization starting on their RM journey? Where would you recommend that they start to achieve the biggest impact? File shares, email, etc?
4. Do you see Blockchain being considered as an option for immutable records for the US government?
5. Is GDPR a factor for the US Federal Government?
6. Do you have guidance for managing structured data since most of the focus seems to be on unstructured records?
7. What other standards around the world affect RM thinking like ISO standards, VERS, MOREQ10?
8. Where do you see the Cloud impacting Governance implementations? Or Hybrid Cloud implementations and long term storage options like Glacier.

5 Minute Q&A from the audience



**From:** Mark Mueller  
**To:** Patrick, Mark S CIV JS DOM (US)  
**Subject:** RE: [Non-DoD Source] Save the Date: 2018 Alfresco Government Summit  
**Date:** Wednesday, April 11, 2018 2:36:08 PM

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---

Good deal. You may seem some email traffic about meeting John Newton during the May 22 summit. I went ahead and submitted a request for you to meet with him.

**From:** Patrick, Mark S CIV JS DOM (US) [Caution-mailto:(b)(6) civ@mail.mil]  
**Sent:** Tuesday, April 10, 2018 8:58 AM  
**To:** Mark Mueller <mark.mueller@alfresco.com>  
**Subject:** Re: [Non-DoD Source] Save the Date: 2018 Alfresco Government Summit

Thanks man. My events will be mostly scripted but will get out to the River Walk.

Mark Patrick  
Chief, Information Management Division

.....  
Joint Staff Secretariat  
Directorate of Management  
400 Joint Staff Pentagon/2D943  
Washington, DC 20318-0400 <x-apple-data-detectors://6/0 >  
 (b)(6)  
Sent from my iPhone

On Apr 10, 2018, at 8:58 AM, Mark Mueller <mark.mueller@alfresco.com < Caution-mailto:mark.mueller@alfresco.com > > wrote:

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---

Have a great time in the Alamo City. (b)(5)  
(b)(5) Hope you can check out the sites while there!!

Sent from my iPhone

On Apr 10, 2018, at 5:48 AM, Patrick, Mark S CIV JS DOM (US)  
<(b)(6) civ@mail.mil < Caution-mailto:(b)(6) civ@mail.mil > < Caution-Caution-mailto:(b)(6) civ@mail.mil < Caution-mailto:(b)(6) civ@mail.mil > > > wrote:


I'm at AIIM18 today through Friday. At the airport getting ready to depart for

San Antonio. Safe travels to the UK and we can connect upon your return.

All email received on Alfresco day. No questions at this time.

Cheers,  
Mark

Mark Patrick  
Chief, Information Management Division


.....  
Joint Staff Secretariat  
Directorate of Management  
400 Joint Staff Pentagon/2D943  
Washington, DC 20318-0400 < x-apple-data-detectors://6/0 >  
 (b)(6)  
Sent from my iPhone

On Apr 9, 2018, at 6:26 PM, Mark Mueller  
<mark.mueller@alfresco.com < Caution-  
mailto:mark.mueller@alfresco.com > < Caution-Caution-  
mailto:mark.mueller@alfresco.com < Caution-  
mailto:mark.mueller@alfresco.com > > > wrote:


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verify the identity of the sender, and confirm the authenticity of all  
links contained within the message prior to copying and pasting the  
address to a Web browser.

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Hello Mark-

I hope that you had a nice Easter weekend. I am back in the office  
and digging my way out. You should have some email from  
 (b)(6) with regard to Alfresco Day and the panel. Just let  
me know if you have any questions or concerns.

I am around this week but out in the UK next week. I will say hi to  
John for you!

I will check out the links you sent about DOD and CIA for sure. I  
am in touch with your team members. Is there anything we need to  
discuss or take care of this week?  (b)(5)

 (b)(5)

Looking forward to catching-up for sure when your schedule  
permits!

All the best,  
-Mark

PS- SOCOM is doing a small mission focused Alfresco deployment..

Mark A. Mueller, Jr.  
Director, DoD and Intel Community  
Mark.Mueller@alfresco.com < Caution-mailto:Mark.Mueller@alfresco.com > < Caution-Caution-mailto:Mark.Mueller@alfresco.com < Caution-mailto:Mark.Mueller@alfresco.com > >  
(703) 627-8374

-----Original Message-----

From: Patrick, Mark S CIV JS DOM (US) [Caution-Caution-Caution-mailto:(b)(6)@mail.mil < Caution-mailto:(b)(6)@mail.mil > < Caution-Caution-mailto:(b)(6)@mail.mil < Caution-mailto:(b)(6)@mail.mil > >]  
Sent: Friday, April 6, 2018 6:13 PM  
To: Tony Franzonello <tony.franzonello@alfresco.com < Caution-mailto:tony.franzonello@alfresco.com > < Caution-Caution-mailto:tony.franzonello@alfresco.com < Caution-mailto:tony.franzonello@alfresco.com > >>  
Cc: Mark Mueller <mark.mueller@alfresco.com < Caution-mailto:mark.mueller@alfresco.com > < Caution-Caution-mailto:mark.mueller@alfresco.com < Caution-mailto:mark.mueller@alfresco.com > >>  
Subject: FW: [Non-DoD Source] Save the Date: 2018 Alfresco Government Summit

Tony,

Since Mark is on vacation, forwarding this to you. The bit about "alumni" is mostly tongue in cheek humor, but thought you might be interested in the other items as well.

Look forward to meeting you at some point.

Best regards,  
Mark

Mark Patrick  
Chief, Information Management Division  
Joint Staff Secretariat  
Directorate of Management  
The Joint Staff, Department of Defense  
Pentagon Room 2D943



(b)(6)

-----Original Message-----

From: Patrick, Mark S CIV JS DOM (US)

Sent: Friday, April 6, 2018 2:49 PM

To: Mark Mueller <mark.mueller@alfresco.com < Caution-mailto:mark.mueller@alfresco.com > < Caution-Caution-mailto:mark.mueller@alfresco.com < Caution-mailto:mark.mueller@alfresco.com > >>

Subject: FW: [Non-DoD Source] Save the Date: 2018 Alfresco Government Summit

Mark,

Do I need to register for this if I'm going to be on a panel? (as an aside, "alumni" is plural; a single person is an alumnus...male or alumna...female, your Carasoft partner ought to get an English major...or maybe Latin? to check his work!)

Haven't looked at the agenda, do you have an idea what the panel will be about, and who else will be on it?

I'm going to be at AIIM18 Tuesday-Friday next week. Was at NGA's RIIM event yesterday on a panel. The speaker from CIA's Data Innovation office was very good and their program is very interesting. Are you following that?

Also, you may have seen a press release that the DOD is getting a new CIO from industry (as in zero public sector background.) Here's the press release: Caution-Caution-Caution-  
<https://fcw.com/articles/2018/04/05/new-dod-cio-williams.aspx>.

I've already connected with him on LinkedIn and he was at BP with Russ Stalters who I know from AIIM (Russ spoke at our chapter meeting and is also a former naval aviator) so I already have some insight.

I'm working with DOD CIO to make an impact at DISA's KM Symposium in Baltimore in May. It's piggy-backing on AFCEA's cyber symposium. Details: Caution-Caution-Caution-  
<https://www.disa.mil/NewsandEvents/Events/KM-Symposium>. I can give you some background on what we're trying to do there, strategically, and specifically how we're trying to influence the KM, RM, and data management crowd moving forward.

Have a good weekend,  
Mark

From: (b)(6) @m.carahsoft.com < Caution-mailto:(b)(6)@m.carahsoft.com > < Caution-Caution-mailto:(b)(6)@m.carahsoft.com < Caution-mailto:(b)(6)@m.carahsoft.com > >  
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mailto:(b)(6)@m.carahsoft.com > > ]  
Sent: Friday, April 06, 2018 10:20 AM  
To: Patrick, Mark S CIV JS DOM (US)  
Subject: [Non-DoD Source] Save the Date: 2018 Alfresco  
Government Summit

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#### **Alfresco Government Summit**

Date: Tuesday, May 22, 2018  
Time: 7:30am - 5:00pm ET  
Location: Old Post Office Pavilion  
1100 Pennsylvania Ave NW  
Washington, D.C. 20004  
Directions: Caution-Caution-Caution-Caution-  
[http://carahevents.carahsoft.com/go/link?](http://carahevents.carahsoft.com/go/link?l=f2730280e76943d3841185d2f327730e&i=879085b37ff742d2afe3e2e44563ef42)  
[l=f2730280e76943d3841185d2f327730e&i=879085b37ff742d2afe3e2e44563ef42](http://carahevents.carahsoft.com/go/link?l=f2730280e76943d3841185d2f327730e&i=879085b37ff742d2afe3e2e44563ef42)

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[l=326e5c1a3f8d47f6a696fd45d7760259&i=879085b37ff742d2afe3e2e44563ef42](http://carahevents.carahsoft.com/go/link?l=326e5c1a3f8d47f6a696fd45d7760259&i=879085b37ff742d2afe3e2e44563ef42)

#### **Save the Date!**

As an alumni of this event, we want you to be the first to know about the 2018 Alfresco Government Summit. Mark your calendars for the can't miss conference in D.C. at the Old Post Office Pavilion.

Save the date to join us for a day of discussion with government and industry experts about Advancing the Digital Flow of Government Business. Topics will include:

- Information Management Modernization
- Compliant Records Management
- Exciting Alfresco Product Announcement

In addition to the learning sessions, we will have a great time networking over drinks and appetizers touring the historic Clock Tower in the Old Post Office Pavilion.

Check back on our event page for important updates, including agenda and speaker announcements! Caution-Caution-Caution-

Caution-[http://carahevents.carahsoft.com/go/link?  
l=b408b9adee2241c0aa890b33679385bf&i=879085b37ff742d2afe3e2e44563ef42](http://carahevents.carahsoft.com/go/link?l=b408b9adee2241c0aa890b33679385bf&i=879085b37ff742d2afe3e2e44563ef42)

(b)(6)

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l=9d270027926d468e90eedce7f9ab0ab4&i=879085b37ff742d2afe3e2e44563ef42](http://carahevents.carahsoft.com/go/link?l=9d270027926d468e90eedce7f9ab0ab4&i=879085b37ff742d2afe3e2e44563ef42)

(b)(6)

CIV (US)

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**From:** Patrick, Mark S CIV JS DOM (US) </O=EASF/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=(b)(6) CIV> on behalf of Patrick, Mark S CIV JS DOM (US)  
**Sent:** Monday, April 9, 2018 3:47 PM  
**To:** (b)(6)  
**Subject:** Accepted: Alfresco Government Summit: Modernizing Records Management Panel

**From:** (b)(6)  
**To:** Patrick, Mark S CTV JS DOM (US)  
**Cc:** Mark Mueller; Tara Combs  
**Subject:** [Non-DoD Source] Alfresco Government Summit 2018 - Speaking Opportunity  
**Date:** Monday, April 9, 2018 3:11:38 PM  
**Attachments:** [image001.png](#)  
[image002.png](#)  
[image003.png](#)  
[image004.png](#)  
[image005.png](#)  
[image006.png](#)  
[image007.png](#)

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Hi Mark --

I hope this email finds you well!

I am pleased to hear that you will be joining us as a speaker at Alfresco's Government Summit < Caution-<https://www.alfresco.com/events/2018-alfresco-government-summit> > event on Tuesday, May 22<sup>nd</sup>. I went ahead and completed the registration process on your behalf so you should no longer receive promotional communications but rather communications focused on event logistics and details.

As for your speaking session, we have you slated to participate on the Modernizing Records Management Panel at 11:15 a.m. (45 minute panel) with Usa Haralampus from NARA and Tara Combs as the Moderator. We are finalizing the questions and direction of the panel and will be sure to share those with you for feedback in advance of the event. I will go ahead and put a placeholder on your calendar for the day of the event with the details needed.

I'll be your point of contact and will touch base in a few weeks to schedule a kick-off call with all panel participants, but don't hesitate to reach out if you have any questions in the meantime.

Always a pleasure working with you and we appreciate your support!

Best regards,

(b)(6)  
Senior Manager, Global Customer Advocacy  
Mobile: (b)(6)  
Skype: (b)(6)



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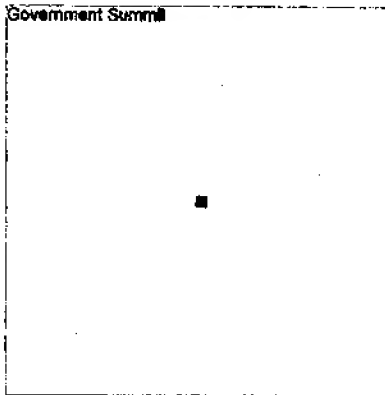
[https://www.glassdoor.co.uk/Overview/Working-at-Alfresco-Software-EI\\_IE404506.11,28.htm](https://www.glassdoor.co.uk/Overview/Working-at-Alfresco-Software-EI_IE404506.11,28.htm) >



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## Government Summit



Hi there

Mark your calendars for the can't miss conference in DC at the Old Post Office Pavilion in Trump Hotel.

Save the date < [Caution-http://go.alfresco.com/vAD10K0yVL0w0GZNI2T4RU](mailto:Caution-http://go.alfresco.com/vAD10K0yVL0w0GZNI2T4RU) > to join us on May 22, 2018 for a day of discussion with government and industry experts about Advancing the Digital Flow of Government Business. Topics will include:

- Information Management Undermined
- Compliant Records Management
- Exciting Alfresco Product Announcement

In addition to great learning sessions, we will have some fun over drinks and appetizers at the end of the day and the option to tour the historic Gov. Tower in the Old Post Office Pavilion.

For a taste of what we'll be talking about, download < [Caution-http://go.alfresco.com/vU0K0yQZTV0Za0M44010LO](mailto:Caution-http://go.alfresco.com/vU0K0yQZTV0Za0M44010LO) > our new whitepaper on Advancing the Digital Flow of Government Business. In the article we explore how modernizing your content management and process management systems can help affect real change – better processes, easier ways of working and reducing costs.

If you have any questions regarding the Alfresco Government Summit < [Caution-http://go.alfresco.com/vAD10K0yVL0w0GZNI2T4RU](mailto:Caution-http://go.alfresco.com/vAD10K0yVL0w0GZNI2T4RU) > reach out to [kim.grant@alfresco.com](mailto:kim.grant@alfresco.com)

Regards,  
The Alfresco Team

**From:** Mark Mueller  
**To:** Patrick, Mark S CIV JS DOM (US)  
**Cc:** (b)(6)  
**Subject:** RE: [Non-DoD Source] Alfresco Federal Day - May 22, 2018  
**Date:** Wednesday, March 28, 2018 3:14:31 PM  
**Attachments:** image001.png

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Hello Mark-

I hope that you are well. I wanted to check in with you with regard to our upcoming Federal Alfresco Day on May 22<sup>nd</sup>. We would love to have you participate in a panel discussion during the event.

(b)(6) (cced) is coordinating on our end. You may be on spring break this week as it seems that most are out. I am in the office this week but out next week on Spring break. I will be back in the office on April 9<sup>th</sup>.

Looking forward to catching up soon!

VR,  
-Mark

Mark A. Mueller, Jr.

Director, DoD and Intel Community

Mark.Mueller@alfresco.com <Caution-mailto:Mark.Mueller@alfresco.com >

(703) 627-8374

cid:image007.png@01D2C4E0.D9F73160



**From:** Patrick, Mark S CIV JS DOM (US) [Caution-mailto (b)(6).civ@mail.mil]  
**Sent:** Friday, March 16, 2018 8:48 AM  
**To:** Mark Mueller <mark.mueller@alfresco.com>  
**Subject:** Re: [Non-DoD Source] Alfresco Federal Day - May 22, 2018

I thought Chris's talk was very thought provoking. Going to try and prompt the board to socialize our MeetUps better. I think the content is good and it's a good low pressure mixing environment for vendors and end users (even a way for vendors to size up their competition!) (b)(5)

(b)(5)

I'll try and get you an update on the Baltimore thing ASAP.

It looks like I have availability on 22 May, so full steam ahead there. Am going to do some calendar scrubbing today so will get back to you to be sure.

Would love to see John if it works for him.

Happy Friday! Unfortunately Villa Nova put a hurting on the Highlanders last night but they were lucky to get in. Let's hope UVA has better luck tonight. I'm nervous without Hunter.

Mark Patrick  
Chief, Information Management Division

.....  
Joint Staff Secretariat  
Directorate of Management  
400 Joint Staff Pentagon/2D943  
Washington, DC 20318-0400 <x-apple-data-detectors://6/0 >



(b)(6)

Sent from my iPhone

On Mar 15, 2018, at 8:26 PM, Mark Mueller <mark.mueller@alfresco.com < Caution-mailto:mark.mueller@alfresco.com > > wrote:

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---

Hello Mark-

As always, it was great to see you and speak with you at the AIIM meeting this evening. We would love to have you participate in our upcoming Alfresco Federal Day on Tuesday, May 22<sup>nd</sup> at the Trump Hotel/Old Post Office Pavilion. If interested, we would love for you to participate in a panel discussion during the day. We are working on firming up the agenda and specifics over the next two weeks.

I mentioned that there is a chance that John Newton may be passing through town on Monday March 26<sup>th</sup>. If he does and his schedule has some openings, and if you are available; I can try to bring him by to see you for a cup of coffee. More to follow on that.

Finally, your mention of the event in Baltimore on May 17 reminded me that I offered

up Ankur Laroia, our Director of Global Strategy. I have his calendar blocked for that day so just let me know if anything changes.

Have a great weekend!

VR,  
-Mark

Mark A. Mueller, Jr.  
Director, DoD and Intel Community  
Mark.Mueller@alfresco.com < Caution-  
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mailto:Mark.Mueller@alfresco.com < Caution-mailto:Mark.Mueller@alfresco.com > >  
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